BSO Tutorial for Tax Year 2003

W-2 Online

Contains the following lessons:

- [Create a Form W-2 Online](#)
- [Resume the Creation of Unsubmitted Form W-2s](#)
- [Download Submitted W-2s](#)

Lesson 1: Create Form W-2s Online

Follow the instructions below to create up to 20 Form W-2s online.

Step 1: Point your browser to the Business Services Online Welcome page:
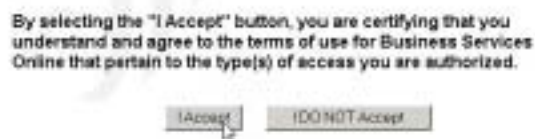www.socialsecurity.gov/bso/bsowelcome.htm.

Step 2: Select the **Login** link on the Business Services Online Welcome page.

The system displays the BSO - Privacy Policy Statement page.

Step 3: Select the **I Accept** button (located at the bottom of the page) after reading the conditions defined on the BSO - Privacy Policy Statement page.

The system displays the Business Services Online Login page.

Step 4: Enter your PIN and password.

Step 5: Select the **Login** button. The system displays the BSO Home Page. (To return to the Business Services Online Welcome page, select the **Cancel** button.)

Step 6: Select the **Enter Forms W-2 for Tax Year 2003** link.

The system displays the W-2 Online Information page.

*If you have any existing unsubmitted reports, the system will display the Unsubmitted W-2 Online reports for Tax Year 2003 page. For TY 2003, you may have a maximum of five unsubmitted reports at one time. To start a new report, you must first submit an existing report. If there are four or less reports you may continue without submitting the existing reports by selecting the **Start a New Report** button. Refer to* Lesson 2: Resume Unsubmitted W-2s *for more information.*

Step 7: Select the appropriate response for the **FOR WHOM ARE YOU FILING?** section
after reviewing the Registration Information.

NOTE

The FOR WHOM ARE YOU FILING? radio buttons are not available for self-employed users.

Step 8: Select the **Continue** button after reviewing the Privacy Act and Paperwork Reduction Act notice. The system displays the W-2 Online Employer Data page. (Otherwise, select the **Cancel** button to end this session and return to the BSO Home Page.)

Step 9: Enter your employer information.

All fields marked with an asterisk must be completed.

Step 10: Select the **Continue** button. The system displays the W-2 Online Form W-2 page. (Otherwise, select the **Cancel** button to exit and return to the BSO Home Page.)

Step 11: Enter the W-2 data in the appropriate boxes.

Step 12: Select **New W-2** to save this W-2 information and create another W-2. Select the **Done** button to save this W-2 information and proceed to the W-2 Online Data Review page. Select the **Cancel** button to delete entries made to this W-2.

You can enter a maximum of 20 W-2s. When entering your 20th W-2, the system will no longer display the New W-2 button.

Step 13: After you select New W-2 or Done, you may receive an alert. If so, you will need to review your data and make any corrections or select an override response for each alert. Then, select **Done** or **New W-2** to proceed to the W-2 Online Data Review page.

A review of this W-2 has generated the following alerts.

Please review the data associated with the alerts and make any corrections necessary.

Name and SSN Mismatch Alert :
The Name and SSN you provided does not match our records. Please verify that the name and SSN exactly match the name and SSN on the employee's Social Security card. If you are sure the SSN and Name are correct, check the box below. Select a button at the bottom of this page to continue.

☐ Check this box if the SSN and Employee name data provided is correct according to the Employee's Social Security Card and your payroll records.

Social Security Tax Rate Alert:
The Social Security tax rate for 2003 is 6.2%. The Social Security tax withheld (Box 4) on $ 4,500.00 (Box 3 + Box 7) should be $ 279.00. If you are sure the Social Security wages (Box 3), tips (Box 7) and tax withheld (Box 4) amounts are correct, check the box below then select a button at the bottom of this page to continue processing this W-2.

☐ Check this box if the Social Security wages, tips, and tax withheld data provided is correct.

Medicare Tax Rate Alert:
The Medicare tax rate for 2003 is 1.45%. The Medicare tax withheld (Box 6) on $ 30,000.00 (Box 5) should be $ 435.00. If you are sure the Medicare wages and tips (Box 5) and Medicare tax withheld (Box 6) amounts are correct, check the box below then select a button at the bottom of this page to continue processing this W-2.

☐ Check this box if the Medicare wages and tips, and Medicare tax withheld data provided is correct.

Step 14: Select the **View/Edit** button next to the appropriate record to view or edit the W-2 data. If you want to delete the W-2 data, select the **Delete** button next to the appropriate record.

Step 15: Select one of the following options: **New W-2**, **Edit Employer Info**, **Go to W-3**, **Save & Quit**, or **Quit without Saving**.

The Save & Quit option will not be available if you logged in with your PIN and SSN.

NOTE

Step 16: Select the **Go to W-3** button to submit your wage data. The system will display your W-2 Online Form W-3 for your review.

Step 17: Select one of the following options:

Submit Wage Report button to submit your wage information. Go to **Step 18** for more information.

Print Wage Report button to print or preview your wage report prior to submitting it to SSA. Go to **Step 22** for more information.

> **Return to W-2 Data Review Page** button to edit your data. Go to **Step 27** for more information.

Step 18: Select the **Submit Wage Report** button on the W-2 Online Form W-3 page. The system displays the W-2 Online Receipt Acknowledgement page.

Step 19: Right-click the file link to save the wage file.

Step 20: Select **Save Target As** option from the browser menu to save the file. (Otherwise, select the **Continue** button.)

Your Wage File Identifier (WFID) is JNY883.
The WFID is a number assigned to your submission for tracking purposes. You can check on the status of your submission by selecting *View Submission Status / Errors / Notice Information* on the BSO Home Page and looking for this WFID.

IMPORTANT! Do the following before proceeding:

1. Use your browser menu to save or print this acknowledgment of receipt for your records.
2. Right-click on the file link below (or tab to it and press Shift + F10) and select *Save As* to download your W-2 / W-3 file. Depending on your configuration, this download could take 5 minutes or longer.

You will need Adobe Acrobat Reader to print your Forms W-2 and Form W-3. Acrobat Reader version 5.0 is recommended. If this software is not installed on your computer, follow this link to download it from Adobe's free download page.

Note: You can also open the file in Acrobat Reader from its current location without downloading it. To open the file from its current location, left-click on the WFID (or tab to it and press Enter).

Employers are required by law to keep copies of Forms W-3 and W-2 for four years. This file will continue to be available through **10/24/2003** by selecting 'Download Submitted W-2's' from the BSO Home Page. After this date, it will be discarded.

JNY883.pdf

| Open |
| Open in New Window |
| Save Target As... |
| Print Target |
| Cut |

Continue

Your wage file will be available for you until the date displayed on your Receipt Acknowledgement.

NOTE

Step 21: Select the **Continue** button. The system displays the W-2 Online Thank You page.

Step 22: Select the **Print Wage Report** button on the W-2 Online Form W-3 page to print the wage report. The system displays the W-2 Online Report Print page.

*If you do not have Adobe Acrobat Reader on your computer, you can download it by selecting **follow this link** near the top of the page.*

Step 23: Select the **Print Preview** link. The system displays the Forms W-2.

Step 24: Select **File>Print** from the menu bar or select the **Print** icon from the tool bar.

Step 25: Select **File>Close** on the menu bar after printing to close the window.

The system returns you to the Print Preview page.

Step 26: The options on the Print Preview page will allow you to submit your wage file to SSA, return to the W-3 page, return to the W-2 Online Data Review page, save your data, or quit without saving your data.

Step 27: Select the **Return to W-2 Data Review Page** button on the W-2 Online Form W-3 page to edit your W-2 data. The system returns you to the W-2 Online Data Review page.

Lesson 2: Resume Unsubmitted W-2s

Follow the instructions below to continue working with W-2 Online reports that you have saved but not yet submitted. SSA will delete any saved reports that you do not submit or update within 90 days. All unsubmitted Form W-2s will be removed on December 31.

You may have up to five saved reports. If you have more than one saved report, you must re-enter W-2 Online after resuming work with each one.

Step 1:   Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
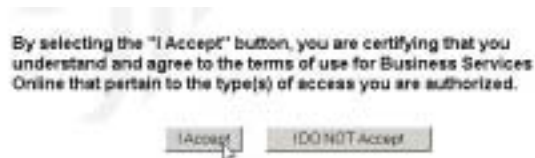

Step 2:   Select the **Login** link on the Business Services Online Welcome page.

The system displays the BSO - Privacy Policy Statement page.

Step 3:   Select the **I Accept** button (at the bottom of the page) after reading the conditions defined on the BSO - Privacy Policy Statement page.

The system displays the Business Services Online Login page.

Step 4: Enter your PIN and password.

Step 5: Select the **Login** button to display the main menu. The system displays the BSO Home Page. (To return to the Business Services Online Welcome page, select the **Cancel** button.)

Step 6: Select the **Resume Unsubmitted W-2s** link.
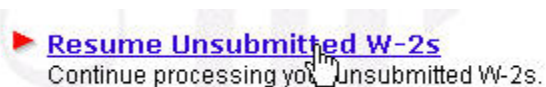
The system displays the Unsubmitted W-2 Online Reports page.

Step 7: Select the **View/Edit** button for the specific report to view or modify the report. The
system displays the W-2 Online Data Review page. (To delete the report, select the
Delete button for the specific report.)

*The **Start a New Report** button will not be displayed if you have the
maximum number of unsubmitted reports (5).*

Step 8:   Select the **Go to W-3** button. The system displays your Form W-3. Use the options on this page to submit your wage report, print your wage report, or return to your unsubmitted Form W-2s.
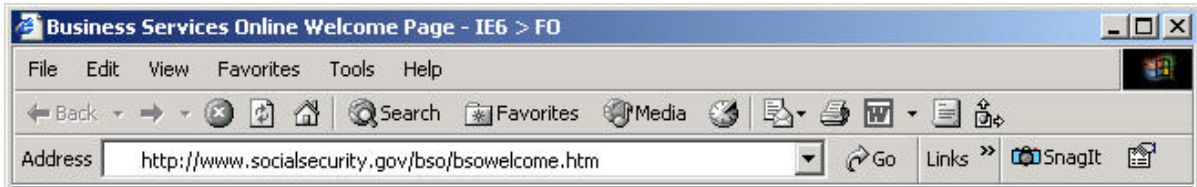
Lesson 3: Download Submitted Form W-2s

Follow the instructions below to download an Adobe file containing Forms W-2 and W-3 for a W-2 Online report submitted within the last 30 days.

Adobe files are available for 30 days or until December 31.

Step 1: Point your browser to the Business Services Online Welcome page:
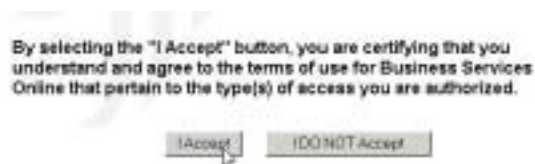www.socialsecurity.gov/bso/bsowelcome.htm.

Step 2: Select the **Login** link on the BSO Welcome page.

The system displays the BSO - Privacy Policy Statement page.

Step 3: Select the **I Accept** button (located at the bottom of the page) after reading the conditions defined on the BSO - Privacy Policy Statement page.
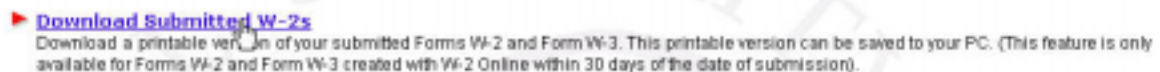

The system displays the Business Services Online Login page.

Step 4: Enter your PIN and password.

Step 5: Select the **Login** button to display the main menu. The system displays the BSO Home Page. (To return to the BSO Welcome page, select the **Cancel** button.)

Step 6: Select the **Download Submitted W-2s** link.

The system displays the W-2 Online Download page with previously submitted Wage Statements.

Step 7: Right-click the **WFID** link you wish to download.

Step 8: Select the **Save Target As** option from the browser menu to download the file onto your computer.

Step 9: Select the **Return to the BSO Home Page** link to return to the BSO Home Page.